



Price Performance Trade-Off (PPT) ***(With Exercises)***

April 2002



Overview



- **Genesis**
- **What It Is**
- **Acquisition Strategy**
- **Technical Acceptability**
- **Sections L & M Problem Areas**
- **The Evaluation Process**
- **The Tradeoff Decision**
- **Documentation**
- **Summary & Tools**



Genesis of PPT



- In 1996 Dr. Steve Kelman, then Administrator of the Office of Federal Procurement Policy, and DoD began a major effort to reform the rules governing use of past performance which resulted in revision of the FAR



Genesis of PPT (Cont)



- The emphasis led to a general shift from Sealed-Bid and Low Price Technically Acceptable (LPTA) to an approach that elevated the importance of past performance
 - **LPTA within Best Value continuum but doesn't permit tradeoff for better performer**
 - **Initially past performance evaluated in LPTA as pass/fail**
 - **Emphasis on Past Performance led to PPT process**



PPT - What Is It?



- Pass/fail evaluation for technical acceptability (if necessary)
- Performance risk evaluated (similar to source selection) and a confidence rating assigned based on recency, relevancy and quality of past performance
- Past Performance and price are both considered and a trade-off decision made to award a contract that reflects the best value for the customer



PPT - What Is It?



- Used extensively in federal government with great success
- Allows the government to award to other than the offeror with the lowest evaluated price and award to an offeror with a better performance risk rating
- *Past performance has ALWAYS been evaluated but now under PPT there is the ability to get to a other than the lowest price performer with a passing grade!*



PPT - Acquisition Strategy



- Market research critical
 - Field of potential offerors exists
 - Experience of offerors relates to requirement
- Requirements are well defined
- Requirements can be assessed using Past Performance
- Quality of performance matters to mission
 - Willingness exists to trade-off and pay more for better performing contractor
 - Purchase “worth” the effort to conduct past performance assessment (type and size of effort)
 - Pencils not worth effort but cleaning of buildings is



PPT - Acquisition Strategy



- Budget and mission place emphasis on meeting requirements in a quality manner
 - Thresholds already set at high standard
 - Money not available to encourage offerors to develop proposals that exceed thresholds
- Service contracts are good candidates
 - Requirement is related to quality of life areas
 - Performance impacts working place and personnel



PPT -Technical Acceptability



- Technical Acceptability can only be evaluated as pass/fail
- Ask if the technical acceptability test really provides information that would not be obtained in evaluating relevant past performance
- Should focus on *specific* issues of merit that cannot be evaluated when looking at relevant past performance
- Technical acceptability items should not require the contractor to explain how they will meet all SOW requirements
- Discussions may be needed to make pass/fail determination



Section L &M Problem Areas



- AFFARS 5315 Past performance evaluation definitions not used
- AFFARS 5315 Definitions are repeated rather than being referenced
- Information submittal date omitted
- Relevancy as it pertains to requirement is not defined
- Contractors are limited to a min or max number of contracts
- Contractors are told to track responses to questionnaires
- No reference made to evaluation of subs, teaming partners, predecessor companies, key personnel (FAR 15.305(a)(2)(iii))
- Requirement to evaluate extent of participation of small disadvantaged business concerns not addressed (FAR 15.305(c)(4)).



Section L & M Problem Areas



- Government “ties hands” by
 - Stating “everything submitted will be evaluated”
 - Prioritizing sources of data
 - Limiting sources of data
- Sections L & M fail to include FAR clauses
- Language in L & M repeats what’s in FAR clauses
- Questionnaires are long and too generic in nature and duplicate automated information
- Definitions from DoD Past Performance Guide not used on questionnaire



Past Performance Systems



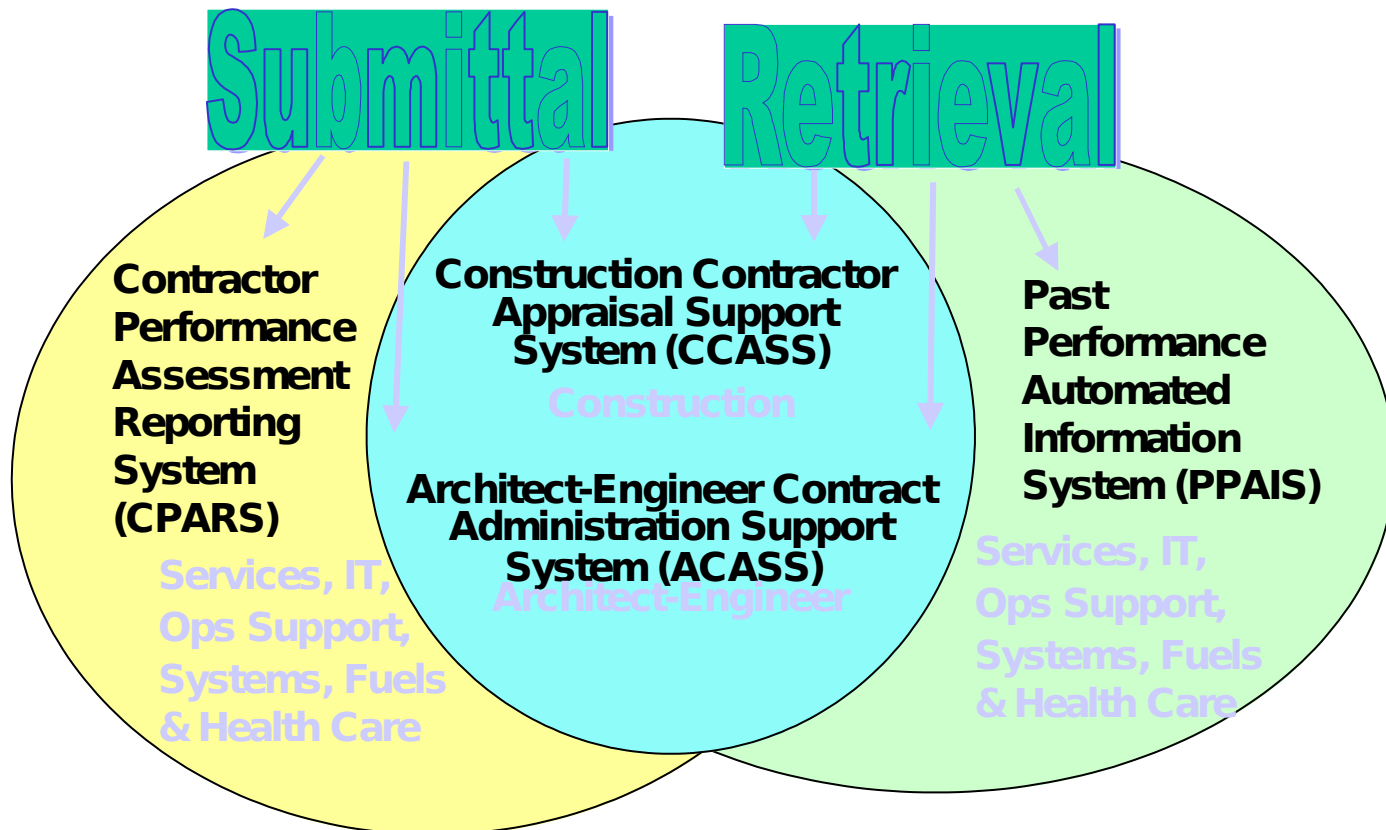
- **Information obtained through automated systems, questionnaires and telephone surveys about performance on relevant contracts for prime and subcontracts**
 - Past Performance Automated Information System (PPAIS) which is the repository of completed Contractor Performance Assessment Reporting System (CPARS) reports
 - Army Corps of Engineers' Contract Construction Contractor Appraisal Support System (CCASS) (Construction)
 - Army Corps of Engineers' Architect-Engineer Administration Support System (ACASS) (A&E)
- **Performance Risk assigned using the Performance Risk ratings established in AFFARS 5315.3**



Past Performance Systems



Past Performance Systems





Evaluation Process



- May award without discussions
 - Issues dealing with Past Performance
- Discussions may be necessary
 - Technical Issues
 - Cost



Discussion or Clarifications?



- Questions about past performance considered clarifications (can ask past performance questions and still award without discussions)

GAO Decision

» **BE Inc., PAI Corp., GAO, B-277978, 12/16/97**

- Department of Energy used oral presentations to evaluate past performance and asked questions about past performance information alone and awarded contract
- Both of the unsuccessful offerors protested
- GAO ruled questions regarding past performance constituted clarifications only and did not fit the FAR 15.601 definition of discussions



Evaluation Process (cont'd)



- Request Final Proposal Revisions
- Evaluate Final Proposal Revisions



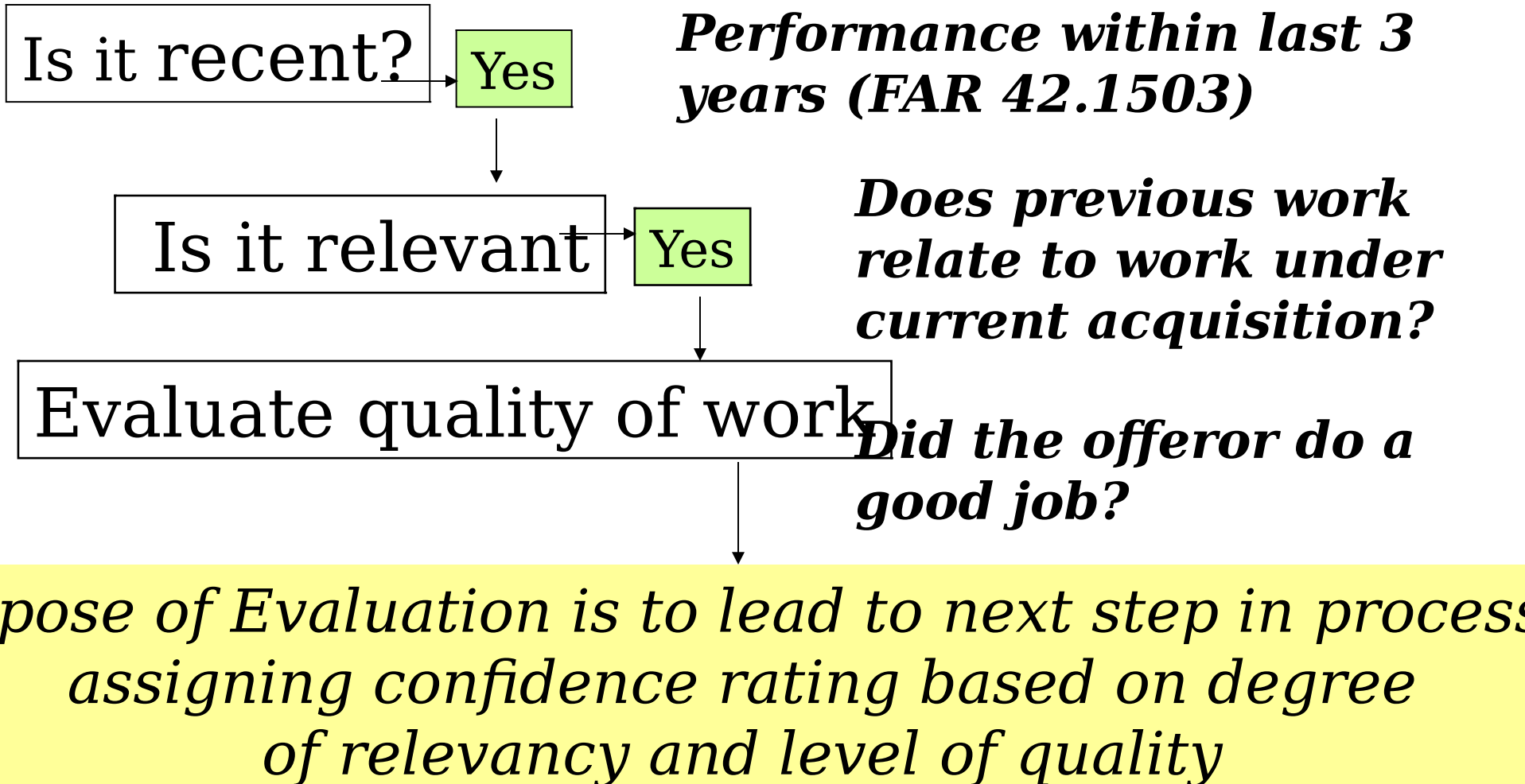
Evaluation Process (cont'd)



- Award may be made to the technically acceptable, low price offeror with an “acceptable” performance risk
- The government has the right to make a trade-off decision and award to other than the low priced offeror who has a better performance risk rating
 - Good business judgement shall be used in making a trade-off decision
 - Basis for decision must be thoroughly documented



Evaluation Steps





Is it Recent?




- In the RFP only request PPI from current performance and work completed within last 3 years
 - Can use older info if offeror provides (GAO decision)
- More emphasis on most recent projects
 - Learning curves
 - Continuous improvement
 - Technology
 - Management



Is it Relevant?



- Consider size and complexity
 - management
 - skills
 - nature of work
 - contract type
- Relevancy determinations must relate to the work that offeror or subcontractors will be performing on instant contract
-  Relevancy does not mean the same work but similar work - take the big picture view of relevancy



Evaluating Relevancy Situation #1



- You obtain past performance information from one offeror indicating that for this requirement personnel from their East Coast division will be used. All the relevant contracts provided by the offeror for consideration indicate the past performance points of contact for the company are key personnel that are assigned to their West Coast offices. Any comments?*



Evaluating Relevancy Situation #1



One offeror for this requirement proposes using personnel from their East Coast division and provides past performance points of contact on key personnel that are assigned to their West Coast offices. Any comments?

- **Performance can vary from one division of a company to another. Just because one area has excellent past performance standing, if none of the talent or organizational structure is being applied to your contract, you can not be assured that the same results will be achieved - you might have an overall impression of the company, but the best information will be on the performance of the key players being proposed for your effort.**
- **This would be something you would want to ask the offeror - they may have other contacts to suggest that would give you a higher level of confidence about the East Coast operation. OR this might lead you to ask additional questions (no rule against asking more questions than what you sent out on the questionnaire) to see if the company as a whole has a reputation for hiring excellent people and managing all their divisions well.**



Evaluating Relevancy Situation #2



- **The acquisition you are supporting is for specialized medical assistance for physically handicapped children.**
- **Three firms have submitted proposals. You sent out your questionnaires and have responses on all three companies.**
- **A short synopsis of the companies follows.**
- **As you read the next slides consider the issues of relevancy raised and be prepared to discuss them.**



Evaluating Relevancy Situation #2



- Company A is a childcare center with 8 months experience. They do not currently care for any handicapped children. However, they propose hiring a specially trained nurse to assist with caring for the children. Her past performance is exceptional. Past performance responses indicate the firm is having some bumps in getting established. None of the managers have worked in the child care area. One supervisor has worked with children before; the other three came from the Greeting Card industry.



Evaluating Relevancy Situation #2



- The second company, Company B, has 20 years experience caring for injured animals. They have established a worldwide reputation for excellence in caring for crippled and maimed primates. 3 years ago one of the divisions of the company started caring for aged adults with physical disabilities. 2 years in a row this division has been awarded an excellence in service from the state inspectors. This is the division being proposed for your requirement.



Evaluating Relevancy Situation #2



- Company C is a start-up company composed of 5 primary staff members: 2 pediatricians, a physical therapist specializing in rehabilitation of children, a child psychologist and a pre-school teacher. The past performance information you collected indicates this team has over 50 years experience with children. Not one of the questionnaires or surveys conducted indicate any questionable performance issues. In fact, the overwhelming response is that these folks are top-notch performers.



Evaluating Relevancy Situation #2



- **Company A is a childcare center with 8 months experience. They do not currently care for any handicapped children. However, they propose hiring a specially trained nurse to assist with caring for the children. Her past performance is exceptional. Past performance responses indicate the firm is having some bumps in getting established. None of the managers have worked in the child care area. One supervisor has worked with children before; the other three came from the Greeting Card industry.**
- *Although the past 8 months indicate some relevant PP experience, there is doubt about their ability to perform well. One of the key concerns is that they have not cared for children who are physically handicapped and there is overall limited experience caring for children. Although the nurse is proposed, how certain is it that she will be hired?*



Evaluating Relevancy Situation #2



- **The second company, Company B, has 20 years experience caring for injured animals. They have established a worldwide reputation for excellence in caring for crippled and maimed primates. 3 years ago one of the divisions of the company started caring for aged adults with physical disabilities. 2 years in a row this division has been awarded an excellence in service from the state inspectors. This is the division being proposed for your requirement.**
- *Company B – Good corporate experience as a service provider but... they have never cared for children. They do have experience in dealing with physical disabilities and clearly provide more confidence than Company A. You might want to conduct further market research and talk to the state inspectors about similarities in operations of care for adults and children. Firm has ability to transition from one core competency to another.*



Evaluating Relevancy Situation #2



- **Company C is a start-up company composed of 5 primary staff members: 2 pediatricians, a physical therapist specializing in rehabilitation of children, a child psychologist and a pre-school teacher. The past performance information you collected indicates this team has over 50 years experience with children. Not one of the questionnaires or surveys conducted indicate any questionable performance issues. In fact, the overwhelming response is that these folks are top-notch performers.**
- *Company C – Here is where the relevancy of the key personnel becomes critical. Although the company has no history, it is clear that by evaluating the performance of key personnel on this team you can have high confidence that they can care for handicapped children.*



Evaluate Quality of Performance



- Evaluation based on ratings in questionnaires and other information obtained
- Go beyond the adjectival rating on questionnaire
 - Find out what drove the adjectival rating
 - Consider comments in questionnaire
 - Follow-up calls to respondent

★ ★ ★ Evaluate as necessary to get information

Evaluate Quality of Performance

Something to Keep In Mind



- Contract A
 - Threshold is 100%
 - Contractor met 100%
 - Rated *Satisfactory*
- Contract B
 - Threshold is 90%
 - Contractor met 95%
 - Rated *Very Good*
- By the rating alone, it *appears* that Contractor B performed better
- In fact, Contractor A is the better performer
- A fix: In questionnaires ask what the threshold is



Taking the Average: Operation and Maintenance of Weather Satellite



- For this exercise you are an advisor to a source selection team that needs help. The team was in a rush and decided to save time and just tabulated past performance information. They took the average of results and made a determination of the best offeror.
- Using the chart provided to you ([handout](#)) and the information on the next slide explain the pitfalls of “taking the average” of past performance results



Exercise: O&M of Weather Satellite



- **Source Selection to obtain O&M services for a weather satellite for Far Flung Base. 70% of the effort consists of the O&M.**
- **Contract will require the selected offeror to maintain a special test module which requires knowledge of dealing with isotopes. This sensitive module involves significant amounts of classified material transmitted over a classified network. The satellite contractor will not be maintaining the network; they will only be accountable for understanding computer security and assurance as it relates to the correct transmission and processing of classified electronic message traffic. 10% is associated with maintenance of the test module and the data transmission and processing requirements. Although only 10% of effort, the highest risk to performance is associated with the special test module**
- **Other significant effort includes maintenance of a publication and technical library for all unclassified aspects of the satellite. 20% of the effort is associated with publication and technical library.**

SCALE:			
5 Exceptional			
4 Very Good			
3 Satisfactory			
2 Marginal			
1 Unsatisfactory			
	Atlas Labs	Beta Test Group	Consolidated
<i>Question #</i>	average	average	average
	for quest.	for quest.	for quest.
1. Performance in use of isotopes in support of satellite operation testing	1.2	4.8	4.5
2. Management of classified information	1.3	4.5	4.5
3. Performance in the area of computer assurance and security	1.2	4.7	4
4. Management of Publication and/or Technical Library for currency	5	3	0
5. Contract administration functions	5	3	3.7
6. Contractor's use of Small Disadvantaged Business entities in support of contract performance	5	0	3.6
7. Degree to which contractor maintained the required technical skills required for contract performance	5	3.5	3.8
8. Management of Subcontractors	5	3.5	3.8
9. Ability to effectively control costs	5	3	4.2
10. Business Relations with customers and process owners	5	4	2
	3.87	3.4	3.41



Discussion Points



- **Average resulted in offeror with poorest performance in highest risk area getting highest average rating**
- **Average does not distinguish past performance of subs and prime as it relates to work they will accomplish**
- **More relevant projects are not given more weight**
- **More recent projects are not given more weight**
- **Ratings fail to explain basis for low ratings**
- **“O” rating for Beta in SDB should raise questions:**
 - **Does the “0” indicate they never managed a SDB? Is “0” being used to indicate “non-applicable”? Is it appropriate for a non-applicable area to lower the overall rating?**
 - **If Beta was a SDB, how would a rater indicate that? Could “0” rating actually indicate Beta is an SDB?**



Evaluate for Consistency



- **The first exercise will challenge you to determine if past performance evaluation documentation presents consistency in evaluation of offerors who have responded to provide network operations services.**
- **Refer to the [handout](#) provided to you “Past Performance Consistency Scenario: Network Operations ” and work together as a group**



Consistency Scenario



Do you think the supporting information given for the ratings mesh with the definitions in FAR 5315?

- *Offeror #1*
- **Rating does not discuss quality of performance.**
- **Did evaluators conduct a reasonable search for relevant experience to include key personnel, predecessor companies and subcontractors?**
- **The rating is flawed and without more information a supportable rating can not be rendered**
- *Offeror #3*
- **Rationale for satisfactory rating does not flow based on relevancy and quality of performance**



Consistency Scenario (cont'd)



Do you think the supporting information given for the ratings mesh with the definitions in FAR 5315?

- *Offeror #4*
- **Little detail provided**
- **Doesn't address relevancy outside of magnitude**
- **Don't know what the quality (satisfactory/good) was attributed to in the evaluation of past performance**
- *Offeror #6*
- **Both have experience in all areas**
- **Satisfactory ratings are not supported since quality ranges from very good to exceptional for both prime and sub on relevant work**



Consistency Scenario (cont'd)



Are the evaluations given to the offerors consistent? (Do they seem to fairly treat all offerors in a similar manner?) Can you read into the summaries any elements that impacted the ratings other than the performance records?

- **The evaluations are not consistent**
- **Offeror #3 and Offeror #6 Even though the performance records are similar and the relevancy of the work mirrors the requirement, the offerors were given significantly different ratings**
- **There appears to be a bias towards Offeror #6 because each party has done all the effort versus Offeror #3 where the effort is being divided between the prime and sub for Novell and NT based networks**



From Evaluation to Confidence Rating



Information
Gathered from
Questionnaire
s and Other
Sources

Evaluatio
n of
Recency,
Relevanc
y and
Quality

Confidenc
e
Assessmen
t Rating



Confidence Ratings



- Contained in AFFARS 5315
 - High Confidence
 - No doubt exists the offeror will perform
 - Significant Confidence
 - Little doubt exists the offeror will perform
 - Confidence
 - Some doubt exists the offeror will perform
 - Unknown Confidence/ Neutral* (see next slide)
 - No performance record
 - Little Confidence
 - Substantial doubt exists the offerors will perform
 - No Confidence
 - Extreme doubt exists the offeror will perform



**A Note on Neutral Ratings*



- **Rate neutral for NO relevant past performance experience**
- **Should be rare since past performance includes considering:**
 - **Key personnel**
 - **Subcontractors**
 - **Former company**
- **Neutral *does not* mean negative**



Assigning Confidence Rating



- Subjective determination requires judgment
 - Takes time to do good job
 - Combines aspects of relevancy and quality
 - Focusing on most relevant projects reduces time and enhances quality of assessment
 - Offerors should be given opportunity to describe the project in their proposal and explain why they consider it relevant to the proposed work

Evaluation Worksheet

Prime Contractor: ABC Company

Contractor being Evaluated XYZ Sub **Prime** **Sub** X

Work this contractor will perform on contract: Maintain Fleet of 20 Military Turbo Prop Airplanes

Project	Recency	Relevancy	Quality	Overall Rating
Vic Airfield	Completed 7/00	Turbo-props 2 aircraft in fl eet	3 VG, 1 Sat "customer oriented"	
Air Force Academy	Completed 7/99	Single engine, General aviation 15 Aircraft in fl eet	4 Exceptional Quick turn- around. Thorough documentation "	
	All within 3 years, worst performance 3 years ago	Limited turbo- prop experience Some Large fl eet experience	Mostly Excep'l and VG on recent projects. Sat improved.	Little doubt off eror can perform



Adverse Past Performance



- What constitutes “adverse” past performance?
 - DoD Guide states adverse is:
 - “Usually” any rating below “Satisfactory” although this is a judgment call based on circumstances of the acquisition
 - Industry perspective: any rating below “Exceptional”
- How do you know when to clarify?
 - Best interest to discuss even if above satisfactory
 - When information leads to assignment of lower confidence rating
 - When adverse information is provided by only one respondent
 - When there is doubt about the validity of the comments



Adverse Past Performance



- Source Selection teams MAY NOT use adverse past performance information on which the offeror has not had an opportunity to comment
 - FAR 15.306(a)(2), 15.306(b)(4)
 - If the offeror has previously commented (such as CPARS) no requirement to provide additional information
- Government must disclose adverse past performance information to offerors, including identity of contract on which the information is based, but shall not disclose name of individuals who provided information



Subcontractor Information



- Past Performance information is proprietary
- The prime is responsible for the proposal and its contents which includes information submitted by subcontractors
- Government will advise the prime if there is a concern in the area of past performance
 - Prime may already have waiver from sub to discuss information directly with government
 - Discussion directly with subcontractor also option
- Bottom line – government must protect information but can't overlook prime's interest



The Tradeoff Decision



Evaluation
n of
Recency,
Relevanc
y and
Quality

Confidenc
e
Assessmen
t Rating

Tradeoff
Decision



Tradeoff



- Comparison of Proposals
- Consider potential price-performance tradeoff of all offerors with more highly rated past performance than lowest priced offeror
- Determine value to Air Force of awarding to offeror with better past performance at higher cost



The Tradeoff Decision



Offeror A	Offeror B	Offeror C	Offeror D
Confidence	Significant Confidence	High Confidence	Confidence
\$150,000	\$162,000	\$165,000	\$200,000

- Offerors with other than lowest price have better past performance
- Compare value of better past performance to extra cost for both Offerors B (significant confidence) and C (high confidence)
 - Consider benefit to AF



The Final Step - Documentation



Evaluati
on of
Recency,
Relevanc
y and
Quality

Confiden
ce
Assessme
nt Rating

Tradeoff
Decision

Documentation



What to Document



Document the thought process used to arrive at:

- Individual assessments of confidence for each offeror
 - Address recency, relevancy and quality
- Tradeoff Decision
 - Why a tradeoff was made or not made
 - Explain fully determination of best value decision that was made



Key Questions to Ask

- **Have the more relevant past performance assessments contributed more to the overall rating than those that were less relevant? Does the final rating and documentation convey this?**
- **Have the more recent past performance assessments contributed more to the overall rating than those that were less recent? Does the final rating and documentation convey this?**
- **If there were any adverse past performance issues, have they been discussed with the offeror? Have you documented the resolution of any conversations about adverse past performance and the impact of the adverse information on the overall confidence rating?**



More Key Questions to Ask

- **If any past performance information was discounted from evaluation because it was found to be non-relevant, was the rationale for this determination addressed?**
- **If subcontractors are proposed, is the proposed scope of effort (both amount of work and type of work) for the prime and subcontractors addressed?**
- **Does the overall rating tie the relevancy and recency of the past performance information to the scope of the proposed effort for the prime and subs?**



More Key Questions to Ask



- **For offerors with the same final confidence ratings, does the documentation convey consistency of evaluation?**
- **When the same subcontractor is proposed by more than one prime have you consistently evaluated the sub using the same information (assuming they are being used in the same capacity by different primes)**
- **Are the confidence assessment ratings assigned and the documentation used to support the rating consistent with the definitions listed in AFFARS 5315?**



Debriefing Past Performance



- Offerors on two different proposals may be rated differently in the area of past performance even though the same past performance information is used - why?
 - Two teams may evaluate differently even for the same acquisition –
 - Key is consistency between evaluation of different offerors
 - Tradeoff decision made as a comparison between consistent ratings
- Relevancy plus quality yield confidence rating not quality alone
- Documentation of rationale and all considerations is critical



Summary



- Price Performance Trade-Off is a viable option in the Best Valuable continuum while emphasizing importance of past performance
- Currently being used across AFSPC and the rest of the federal government
- Rewards good performers
- AFSPC policy INFO.LTR 99-13, dated 25 Mar 99
- POC: Ms. Suzanne Snyder, DSN 692-5498



Tools for Assistance




HQ AFSPC CONTRACTING DIVISION - Microsoft Internet Explorer

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Address <http://www.spacecom.af.mil/HQAFSPC/contracting/> Go Links



HQ AFSPC CONTRACTING DIVISION

Col Bradley R. Busch, Chief

HOT!

HQ AFSPC/LGC	Small Business	Policy	EC Initiatives
SAF/AQC	Industry Liaison	Training/Info/Checklist	Blue Book 2000
AFSPC Homepage	Gov't Purchase Card	PBSA	Contract Reporting

Done Internet



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Past Performance Information

Past Performance Training	EVALUATING PAST PERFORMANCE RELEVANCY
Price Performance Tradeoff	Documenting Past Performance Evaluation- Questions to Ask
Sample PPI Documentation for Source Selection	Past Performance Collection
Past Performance Automated Information System (PPAIS)	Past Performance Checklist

Last Update: 03/05/02

Internet



Internet Sites for Additional Information



- DoD Guide to Collection and Use of Past Performance Information

<http://www.acq.osd.mil/ar/doc/ppiguide.pdf>

- OFPP Guide to Collection and Use of Past Performance

<http://www.arnet.gov/Library/OFPP/BestPractices/pastperformguid>





One more

Exercise



Putting it together:

Weather Satellite Operations and Maintenance Exercise



Instructions:

Using the information provided you are tasked to assess performance confidence for the Atlas company. As you go through the evaluation process you should make note of any concerns that you have about the information available to you. Think about the kind of follow-up you would conduct if this was what you were given to work with. Be ready to discuss the concerns and questions you identify with the larger workgroup.



Weather Satellite Operations and Maintenance Exercise



- Tools to Use for Exercise:
- **Background Paper: Weather Satellite O&M service**
- **Attachment B1: Questionnaire (Adjectival)**
- **Attachment B2: Additional Information about the offerors from their proposals**
- **Attachment B3: Synopsis of ratings and comments from questionnaires (B3A *Atlas*, B3A.1 *TechSup*, B3A.2 *New Guy*)**
- **Attachment B4: Template to Write Past Performance Analysis**



Weather Satellite Operations and Maintenance Exercise - Summary



- ∇ • **Without further discussion you would not be able to make an informed confidence assessment for this acquisition**
- ∇ • **Need to consider entire contractor team and the proposed work they are going to accomplish on the contract when determining relevancy**
- ∇ • **Even when the ratings are high, without words the evaluation is not as meaningful**
- ∇ • **Quality of responses depends upon not only quality of work but knowledge and skill of respondents**
- ∇ • **Questionnaires alone are not enough -- other sources of information should be used to obtain information**



Weather Satellite Operations and Maintenance Exercise - Summary (cont'd)



- **Projects exactly like your effort probably will not be found - similar does not mean identical**
- **When respondents don't know about an area they may just put in "S"**
- **When highly relevant contracts are evaluated and you understand basis for ratings (New Guy) you don't need to evaluate very many projects**
- **More recent work should be considered more heavily than less recent effort**
- **Not all the questions on the questionnaire weighed as heavily in making confidence assessment**